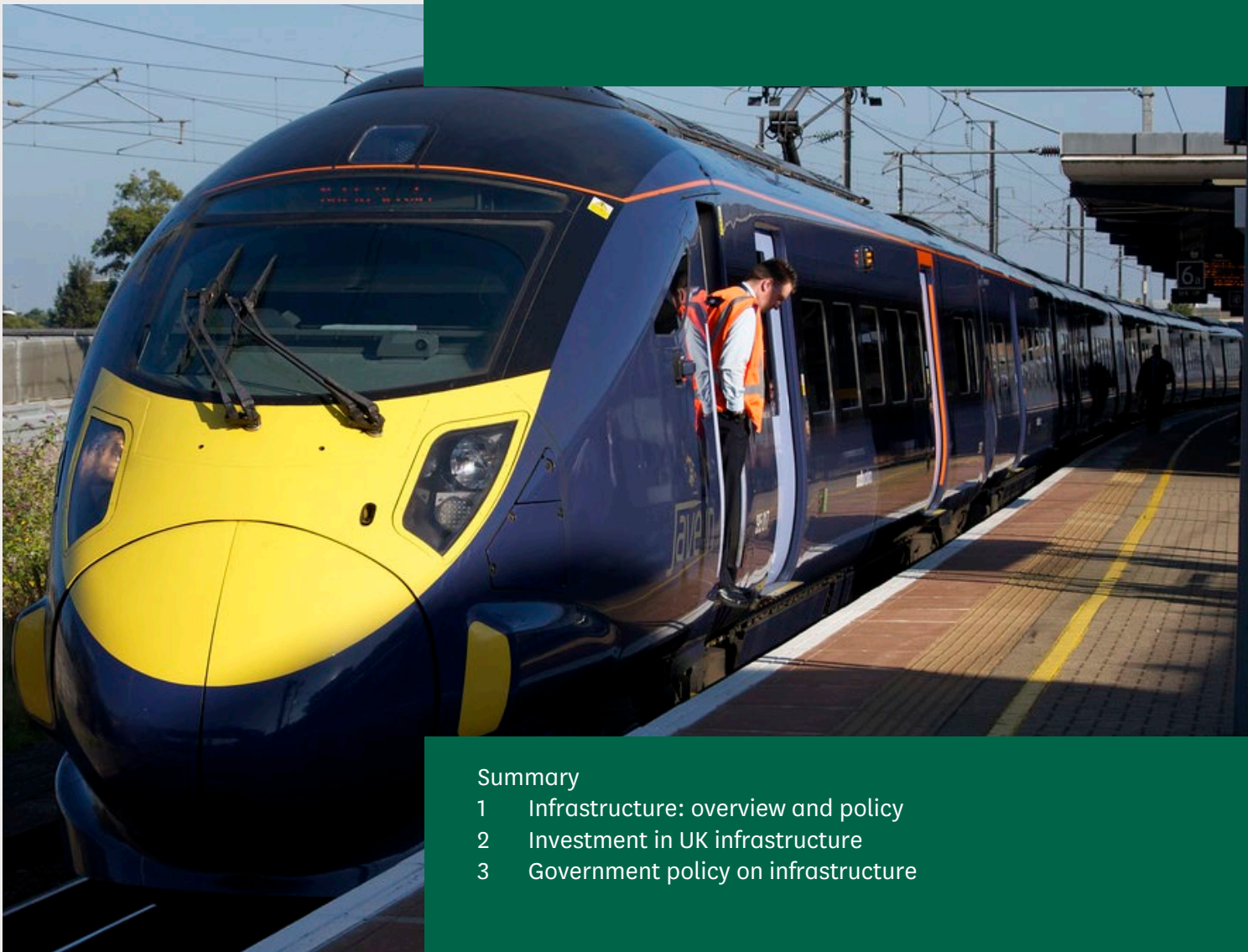


Research Briefing

27 June 2025

By Matthew Keep

Infrastructure in the UK



Summary

- 1 Infrastructure: overview and policy
- 2 Investment in UK infrastructure
- 3 Government policy on infrastructure

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Summary

Infrastructure refers to the physical systems and structures that support a society, economy and enterprises. It includes physical components like roads, bridges, railways, airports, and utilities (such as water supply, electricity, and telecommunications), which are often thought of as economic infrastructure. It also includes social infrastructure like schools, hospitals, and housing.

Better-quality infrastructure allows an economy to be more efficient, improving its productivity, and raising its long-term growth rate and living standards. It can also improve lives in other ways: less congestion may lead to increases in leisure or family time; improved air quality improves health.

The state of UK infrastructure

The National Infrastructure Commission (NIC) – the government’s independent infrastructure advisor – says that while UK economic infrastructure performs well in some areas there are significant deficiencies that are holding the UK back. For instance, it identifies under investment in transport systems in regional English cities and that no major water supply reservoirs have been built in England in the last 30 years.

There is a general acceptance that there has been under investment in UK infrastructure in recent decades. The NIC says investment will need to increase to fund the [“significant changes”](#) required to upgrade the country’s infrastructure.

Challenges for UK infrastructure

Economic infrastructure is slower and more costly to build in the UK than other major countries, [according to the government](#). Sectors such as nuclear power stations, high speed rail and rail electrification have faced cost challenges.

There is evidence that the [UK’s planning system delays infrastructure delivery and creates higher cost](#).

A lack of clear strategic direction and stable policy environment has made it difficult for construction firms to invest in areas that could make them more productive. [Investment in UK infrastructure can be volatile](#), leading to inefficiencies.

There are concerns that the UK economy lacks the required skills to deliver an increase in infrastructure investment.

What is the government's strategy?

Reforms targeting infrastructure are an important part of the government's [economic growth mission](#). By making it easier to build infrastructure the government hopes to improve public services and grow the economy through increased investment.

Infrastructure strategy

The government's [10-year infrastructure strategy](#) was published in June 2025. It covers both economic and social infrastructure, such as hospitals, schools and prisons. It sets out a plan for how infrastructure projects are planned and constructed.

The strategy says the government hopes to drive growth by reforming institutions (such as the National Infrastructure Service and Transformation Authority – see below), providing certainty and stability to attract investment and removing barriers to infrastructure.

The strategy explains how the government will:

- use a spatial approach to planning – which aims to take a coordinated look at infrastructure development across different areas and sectors, rather than treating each project or sector in isolation.
- encourage private investment – by using institutions (such as the National Wealth Fund) to match private capital to investment opportunities, evolving infrastructure financial models and reforming economic regulation of the water, energy and digital sectors.
- boost regional growth through transport and digital connectivity – including increasing maintenance of existing transport networks and improving transport within, and between, towns and cities. Transport projects include East-West Rail, TransPennine Route Upgrade and West Yorkshire Mass Transit system.
- provide the right conditions for new housing – including changing the [National Planning Policy Framework \(NPPF\)](#), funding a new 10-year Affordable Homes Programme and using the [National Housing Bank](#) to catalyse private investment.
- make the UK a clean energy superpower – including securing more offshore wind, onshore wind and solar generation through the [contracts for difference](#) scheme, investing in carbon capture, usage and storage, building new nuclear generation, decarbonising sectors and establishing [Great British Energy](#).

- deliver high quality social infrastructure – including through better collaboration across government and long-term funding for specific programmes. Health, education and justice will be key sectors for investment.
- improve the environment – including through taking a strategic and spatial approach to the environment.

An infrastructure pipeline digital portal will be launched in July 2025. It will be regularly updated and will provide information on publicly funded and financed economic and major social infrastructure projects. The Infrastructure Pipeline will also include privately funded and financed schemes where the necessary information is available.

The government will report on the infrastructure strategy's progress every two years. The National Infrastructure Service and Transformation Authority (NISTA) will oversee the implementation of the strategy.

Devolved administrations

The infrastructure strategy is UK-wide, although some infrastructure sectors (such as water and transport) are devolved policy areas. Many policy tools associated with infrastructure (planning and economic development) are also devolved. The devolved administrations also have their own infrastructure strategies.

Planning reforms for significant infrastructure projects

Major infrastructure projects relating to energy, transport, water and waste are classed as 'nationally significant infrastructure projects' (NSIPs) in England. They require development consent from the relevant Secretary of State.

In the [Planning and Infrastructure Bill 2024-2025](#) the government proposes reforms to the NSIP planning process in England including: changes to the consultation requirements for projects; a requirement for the government to regularly review the statements which guide decision making on projects; and, a revised procedure for legal challenge.

How much is invested in the UK, and where?

Infrastructure projects in the UK are funded by public funding, private funding or a mix of both.

There is no complete measure of total infrastructure investment that covers both government and private sector investment.

Market sector

[UK market sector investment in infrastructure](#) was estimated to be £13.8 billion in 2023 (in 2021 constant prices). The majority of investment was in the [energy](#) (£4.6 billion) and [mining and quarrying](#) (£3.9 billion) industries.

In these estimates, infrastructure investment is defined as civil engineering work or specialised construction work covering economic infrastructure sectors. Social infrastructure is not included.

Government

[Government spending on core economic infrastructure](#) was estimated at £26.0 billion in 2022, which is 34% of total government investment and equivalent to 1% of GDP. The majority is on transport including roads, airports, harbours and railways.

Government infrastructure investment, as a % of GDP, was higher in 2022 and 2021 than in any year since records began in 2006.

The measure of infrastructure used for government infrastructure investment is wider than that used by the ONS for the market sector, so the figures presented here aren't comparable with those of the market sector. The NIC uses a different measure of private sector infrastructure investment to compare with public sector investment. [The NIC's measure suggests private sector infrastructure investment is higher than public sector investment](#) when measured in a similar way to public sector infrastructure investment.

Regional investment

There is no complete measure of infrastructure spending at the sub-UK level.

Based on the broader measure of public sector investment spending (capital spending), London receives the highest investment spending for both economic and non-economic areas, relative to population size. Public sector investment in railways (including London Underground) is particularly high in London.

London and Scotland received the highest level of private sector infrastructure construction in recent years, relative to the size of population. This includes public and privately funded construction work, but not construction work carried out by public sector bodies themselves (for example, National Rail).

Who are the UK's infrastructure public bodies?

Infrastructure oversight

The Labour government has combined two existing infrastructure bodies – the National Infrastructure Commission (NIC) and the Infrastructure and Projects Authority – into one, the [National Infrastructure Service and Transformation Authority](#) (NISTA).

NISTA has six objectives:

- Overseeing the government's infrastructure strategy
- Identifying and coordinating infrastructure needs
- Unblocking barriers and streamlining delivery of the government's major projects
- Setting standards and improving the government's project delivery capabilities
- Providing effective assurance for the government's priority projects
- Leading expertise on private finance

Infrastructure finance

The [National Wealth Fund](#) (NWF) is an investment bank that provides finance to the private sector and local government for infrastructure projects. Its strategic objectives are to support regional and local economic growth and tackling climate change.

The government says the NWF will support its growth mission by:

- Investing in the growth-driving sectors in the [Industrial Strategy](#).
- Investing in support of the Infrastructure Strategy.
- Investing to support strong foundations for economic security and resilience.
- Investing in city regions, high potential clusters, and Mayoral Strategic Authorities' Local Growth Plan Priorities.
- Working collaboratively with the Scottish National Investment Bank, Development Bank of Wales, and the Northern Ireland Executive.

Planning inspectorate

Major infrastructure projects relating to energy, transport, water and waste are classed as ‘nationally significant infrastructure projects’ (NSIPs). They require development consent from the relevant Secretary of State. This regime applies to England and to a limited extent Wales.

Applications for development consent are made to the Planning Inspectorate, which is an executive agency of the Ministry of Housing, Communities and Local Government (MHCLG). The Planning Inspectorate carries out examinations of development consent applications on behalf of the Secretary of State and submits a recommendation report to the Secretary of State.

1 Infrastructure: overview and policy

1.1 What is infrastructure?

There is no official or agreed definition of infrastructure.

The National Infrastructure Commission (see [section 4.1](#)) refers to infrastructure as “the basic physical and organisational structures and facilities (for example, buildings, roads, power supplies) needed for the operation of a society or enterprise”.¹ It defines economic infrastructure as energy, transport, water and wastewater (drainage and sewerage), waste, flood risk management and digital communications.²

The government also includes social infrastructure such as schools, hospitals and housing in some infrastructure policies and publications.

The Economist describes infrastructure as the “economic arteries and veins; roads, ports, railways, airports, power lines, pipes and wires that enable people, goods, commodities, water, energy and information to move about efficiently.”³

1.2 What is the state of UK infrastructure?

The government’s adviser on long-term infrastructure needs, the National Infrastructure Commission (which is now part of the National Infrastructure and Service Transformation Authority – see [section 2.1](#)), summed up the UK’s infrastructure as follows:

While economic infrastructure performs well in some areas, in others there are significant deficiencies that are holding the UK back. These include under investment in transport systems in regional English cities, not building any major water supply reservoirs in England in the last 30 years, leaving too many properties at risk of flooding, and stagnant recycling rates for a decade. This situation must improve.⁴

¹ Office for National Statistics (ONS). [Infrastructure in the UK, investment and net stocks QMI](#), 9 October 2024

² National Infrastructure Commission, [What we do](#) [accessed on 4 January 2021]

³ The Economist. [Essential Economics](#), [accessed on 4 January 2021]

⁴ National Infrastructure Commission. [The Second National Infrastructure Assessment](#), October 2023, [Chapter 1](#)

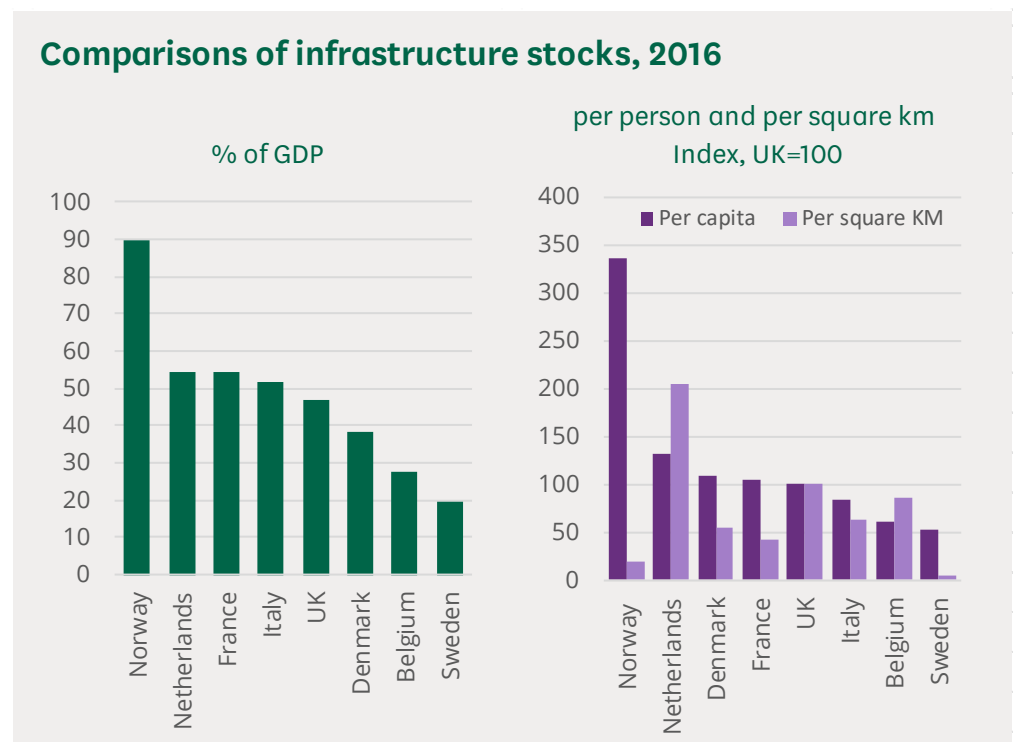
Various reports and analyses have commented that the UK’s infrastructure has seen under investment over the last few decades.⁵ One result of this is regional disparity in the quality of infrastructure between the South East (including London) and the rest of the country.

International comparisons

Infrastructure stock

In 2019, using data for 2016, the Office for National Statistics compared the UK’s infrastructure stock with a selection of seven European countries. As the charts below show:

- the UK had a slightly lower infrastructure stock as a proportion of GDP than Italy and France in 2016
- Infrastructure stocks per person were fairly similar in the UK and France



Source: ONS. [Experimental comparisons of infrastructure across Europe: May 2019](#)

⁵ Resolution Foundation. [Capital gains: Public investment priorities for the 2025 Spending Review](#), 29 April 2025; OECD, [Economic Surveys: United Kingdom 2022](#), August 2022; Resolution Foundation. [Cutting the cuts: How the public sector can play its part in ending the UK’s low-investment rut](#), March 2023; IPPR. [Rock bottom: Low investment in the UK Economy](#), June 2024

Quality rankings

International infrastructure rankings provide a way of comparing the quality of the UK's infrastructure with other countries.

According to the International Institute for Management Development (IMD) the UK was ranked 22nd out of 67 countries in terms of the quality of its infrastructure in 2024.⁶ The UK was close to France (21st), Germany (20th) and Japan (23rd) in the rankings.

According to the World Economic Forum, the UK was ranked 11th out 141 countries in terms of the overall quality of its infrastructure in 2019, behind France (7th), Germany (8th), and the Netherlands (2nd). The USA was ranked 13th.⁷

1.3

What are the UK's future infrastructure needs?

The National Infrastructure Commission (the Commission) produced assessments of the UK's long-term infrastructure needs up to 2050. The [Second National Infrastructure Assessment](#) was published in October 2023. It called for "significant changes" to upgrade the country's infrastructure.⁸

The Commission concluded that infrastructure investment will need to increase significantly over the coming years to make these goals possible. £55 billion is currently spent on average per year but the Commission said this would need to increase to around £70/80 billion per year in the 2030s.⁹ It said the government would need to commit to investing £30 billion per year with the outstanding money sourced from private investments.¹⁰

The Commission made detailed recommendations for each economic infrastructure sector. The Commission made recommendations such as that the government:

- must accelerate deployment of electric vehicle charging points to keep pace with sales of electric vehicles
- should prioritise maintenance and renewal of the existing rail network, ensuring proportionate resilience to climate change impacts

⁶ IMD. [World Competitiveness Ranking](#). [accessed on 6 May 2025]

⁷ World Economic Forum, [Global Competitiveness Report 2019](#), 2019, Pillar 2

⁸ National Infrastructure Commission, [Second National Infrastructure Assessment](#), Executive Summary

⁹ Ibid.

¹⁰ The Commission's figures are aligned with the Conservative government's decision to raise the Commission's fiscal remit for public investment in economic infrastructure to 1.1% - 1.3% of GDP per year.

- should commit long term funding of £22 billion for major transport projects in cities from 2028 to 2045
- should ensure that gigabit capable broadband connectivity is available nationwide by 2030 by continuing to support network competition and market deployment, alongside delivering the £5 billion Project Gigabit programme to provide coverage to premises that are uncommercial
- should identify the specific telecommunications needs of the energy, water and transport sectors and ensure that infrastructure is delivered to meet these by, at the latest, 2030 for the energy and water sectors and 2035 for the road and rail sectors
- must ensure the right conditions are in place to accelerate the market led deployment of 5G

The Commission's recommendations were guided by the following five "policy principles":

1. Removing barriers and accelerating decisions: A call to reform planning laws and regulation to improve consistency and speed of infrastructure project delivery.
2. Taking long term decisions and demonstrating staying power: A recommendation for clear strategic policy direction to redress the inability to attract sufficient private investment.
3. Pace, not perfection: A recommendation to adopt a bigger picture view of infrastructure, in which shorter, faster projects are delivered to contribute towards long-term goals such as net zero and to move away from delivering longer "perfect" projects.
4. Furthering devolution: The Commission called for the improvement of digital and transport infrastructure to unlock regional economic growth whilst increasing devolution to allow local authorities to implement local strategies that align with long term national goals.
5. Adaptive planning: The Commission called to mitigate against the uncertainty of long-term Infrastructure projects by building in flexibility into design processes to take account of, amongst others, future budgetary or legislative changes.

1.4

Challenges for UK infrastructure

Cost

The government acknowledges that it is “slower and more costly to build economic infrastructure in England than other major countries like France and Italy.”¹¹

The National Infrastructure Commission reports that high costs are an issue for some infrastructure sectors in the UK, “[n]uclear power stations, high speed rail and rail electrification have historically faced particular cost challenges in the UK”.¹²

The Commission also reports considerable variability in delivery costs between projects in the UK, arguing that “If poorer performing projects learnt lessons from the best performing projects, average unit costs could be reduced.”

Identifying the issues which drive up costs is difficult because of the variety of different types of infrastructure projects. Summarising work by others, the Commission found there are four root causes that can contribute to systemic failures of cost management on major infrastructure projects:

- A failure to define a clear outcome or to align project specifications with outcomes
- Inappropriate risk management
- Regular redesign and lack of understanding of engineering risks
- Lack of large construction firms and disjointed supply chains

Unstable policy environment

The current government agrees with the Commission that successive governments have failed to provide a clear strategic direction and stable policy environment for investment.¹³

A lack of stability and direction makes it difficult for construction firms to plan efficiently, affecting their investment in skills, machinery and processes that raise productivity.^{14 15} Investment in the UK is more volatile than in

¹¹ PM’s Office. [Kickstarting Economic Growth](#) (accessed on 9 May 2025)

¹² National Infrastructure Commission. [Cost drivers of major infrastructure projects in the UK](#), 10 October 2024

¹³ HM Treasury. [10 Year Infrastructure Strategy Working Paper](#), 27 January 2025

¹⁴ National Infrastructure Commission. [Cost drivers of major infrastructure projects in the UK](#), 10 October 2024

¹⁵ Boston Consulting Group. [Reshaping British Infrastructure: Global Lessons to Improve Project Delivery](#), 7 February 2024

international comparators, leading to inefficiencies caused by peaks and troughs in investment.

Planning system

There is evidence that the UK’s planning system and building regulations delays infrastructure delivery and creates higher project costs in the United Kingdom than elsewhere.¹⁶ Box 1 below sets out the main routes for infrastructure planning approvals in England.

1 Planning approvals for infrastructure in England

Major infrastructure projects relating to energy, transport, water and waste are classed as ‘nationally significant infrastructure projects’ (NSIPs).¹⁷ Under the [Planning Act 2008](#), they require development consent from the relevant Secretary of State (for example, the Secretary of State for Transport approves transport projects). The Library briefing, [Planning for nationally significant infrastructure projects](#) provides further information.

Projects that are not NSIPs (for example, solar farms below 50 MW) require planning permission from the local planning authority, under the Town and Country Planning Act 1990.¹⁸

There are other sources of permission for specific infrastructure sectors. Some utilities infrastructure (for example mobile masts below a certain height) may be installed under permitted development rights; some transport projects are approved through [orders under the Transport and Works Act 1992](#).¹⁹

Planning is a devolved policy area. Scotland and Northern Ireland have different processes for approving large infrastructure project applications.²⁰

The National Infrastructure Commission says the NSIP planning system in England has become overly complex adding “unnecessary costs and uncertainty”.²¹ The Commission reported that the “average consenting time

¹⁶ OECD. [OECD Economic Surveys: United Kingdom](#), September 2024, para 2.1; BCG. [Reshaping British Infrastructure: Global Lessons to Improve Project Delivery](#), 7 February 2024

¹⁷ The threshold above which major infrastructure projects are considered NSIPs is set out in [part 3 of the Planning Act 2008](#). For example, solar farms are classed as NSIPs if they have a capacity over 50 megawatts (increasing to 100 MW from 31 December 2025).

¹⁸ The Library article, [Overview of the planning system \(England\)](#) (August 2023) provides background. The threshold for solar farms to be considered NSIPs will be 100 MW from 31 December 2025.

¹⁹ Permitted development rights are set out in the [Town and Country Planning \(General Permitted Development\) \(England\) Order 2015](#) (as amended); DfT, [Transport and Works Act orders: a brief guide](#), 14 July 2023.

²⁰ The Library briefing, [Comparison of the planning systems in the four UK countries](#) (2016) provides an overview of the different systems for infrastructure planning in each nation.

²¹ National Infrastructure Commission. [Cost drivers of major infrastructure projects in the UK](#), 10 October 2024

for major infrastructure projects in the decade from 2010 increased from around two to around four years”.²² The need for reform to the NSIP regime was identified in the [2020 infrastructure strategy](#). The previous government published an [action plan](#) for speeding up NSIP decisions in 2023.²³

Background to the NSIP process and previous government’s reforms are covered in the Library briefing [Planning for nationally significant infrastructure projects](#) (8 July 2024).

Skills

There are concerns that the UK economy lacks the necessary skills to deliver an increase in infrastructure investment, particularly when faced with competition from other countries with massive investment projects such as Saudi Arabia.

The Public Accounts Committee highlights that there are existing shortages in specific trades such as welding and that design and project management skills are also in short supply.²⁴

²² National Infrastructure Commission. [Cost drivers of major infrastructure projects in the UK](#), 10 October 2024

²³ DLUCH, [Nationally Significant Infrastructure Projects \(NSIP\) reforms: action plan](#), 23 February 2023.

²⁴ Committee of Public Accounts. [Delivering value from government investment in major projects](#), 1 May 2024

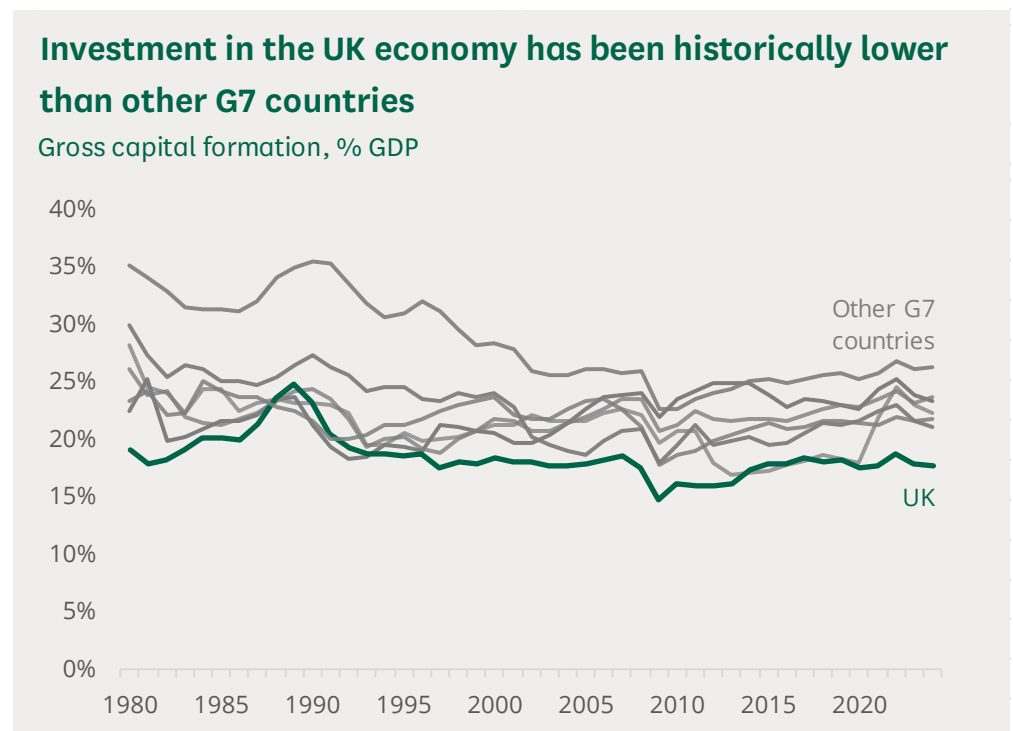
2 Investment in UK infrastructure

2.1 How much is invested in the UK?

Infrastructure projects in the UK may be funded by public funding, private funding or a mix of both. There is no complete measure of total infrastructure investment that covers both government and private sector investment, but available data and analysis suggests UK investment is lower than comparable economies.²⁵

International comparisons

Total investment in the UK economy has consistently ranked behind G7 countries as a percentage of GDP since the late 1990s, shown in the chart below. This measure of investment (gross fixed capital formation) includes infrastructure and housing as well as other assets such as financial assets and intellectual property.



Source: IMF. [World Economic Outlook Database, April 2025](#)

²⁵ Resolution Foundation. [Capital gains: Public investment priorities for the 2025 Spending Review](#), 29 April 2025; IFS. [Public investment: what you need to know](#), 25 April 2024.

UK infrastructure investment

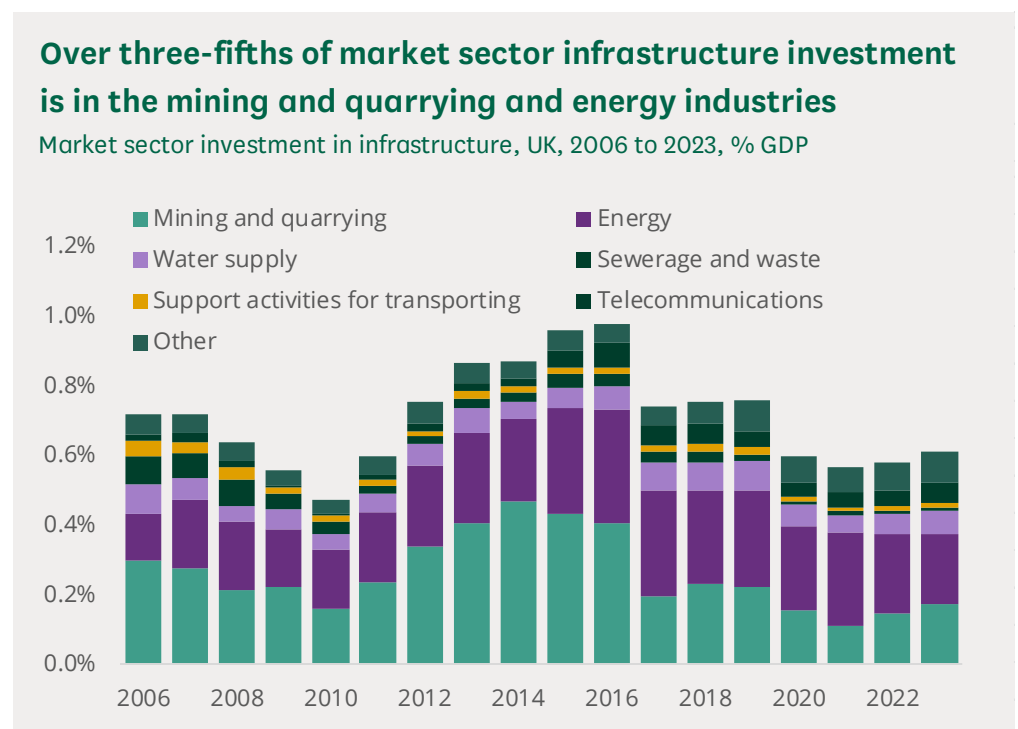
Market sector infrastructure investment

UK market sector investment in infrastructure was estimated to be £13.8 billion in 2023 (in 2021 constant prices). The majority of investment was in the [energy](#) (£4.6 billion) and [mining and quarrying](#) (£3.9 billion) industries.

Infrastructure investment is defined as civil engineering work or specialised construction work covering economic infrastructure sectors (such as transport, energy, water and waste handling assets, telecommunications, mining and quarrying). Social infrastructure (such as housing, schools, hospitals, prisons) is not included.

There are limitations to the methods used for these estimates and the statistics are still under development.

As shown in chart below, market sector investment in infrastructure was equivalent to around 1% of GDP in 2016. It is lower now and closer to 0.6% of GDP. Most of the fall since 2016 is due to a reduction in [mining and quarrying](#).



Sources: ONS. [Infrastructure in the UK, investment and net stocks: July 2024](#); [ONS series BKT1](#)

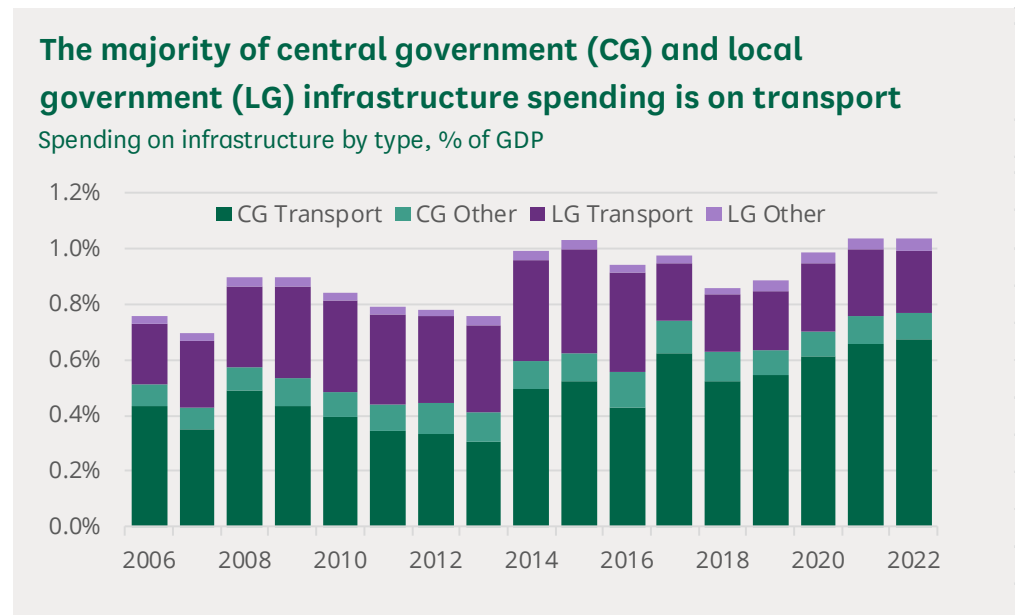
Government infrastructure investment

The ONS estimates that in 2022, government spending on core economic infrastructure was £26.0 billion, 34% of total government investment and 1%

of GDP.²⁶ Government infrastructure investment, as a % of GDP, was higher in 2022 and 2021 than in any year since records began in 2006.

The Office for National Statistics [defines core economic infrastructure](#) as including transport, communication, waste management, wastewater management, water supply and street lighting.

As the chart below shows, the majority of the infrastructure investment comes from central government with much of it going on transport including roads, airports, harbours, and railways.



Source: ONS. [Infrastructure in the UK, investment and net stocks: July 2024](#)

These estimates for government infrastructure investment are not comparable with those shown above for the market sector. The measure of infrastructure investment used for government infrastructure investment is wider than that used by the ONS for the market sector.²⁷ More comparable estimates from the NICs suggest that private infrastructure investment was around £40 billion in 2021, while public infrastructure investment was around £24 billion.²⁸

²⁶ This figure includes central as well as local and devolved government spending.

²⁷ For further information see ONS. Office for National Statistics (ONS). [Infrastructure in the UK, investment and net stocks QMI](#), 9 October 2024

²⁸ NIC. [The Second National Infrastructure Assessment](#), October 2023, figure 1. The private sector investment data from the NICs includes annual capital spending for the Energy, Digital, Water and Waste sectors. ONS sector definitions do not capture construction work to build new assets in these sectors, as that gets put within ONS' definition of the construction sector. The NIC's figures reflect construction work as well as the capital spending within the ONS-defined sectors.

2.2

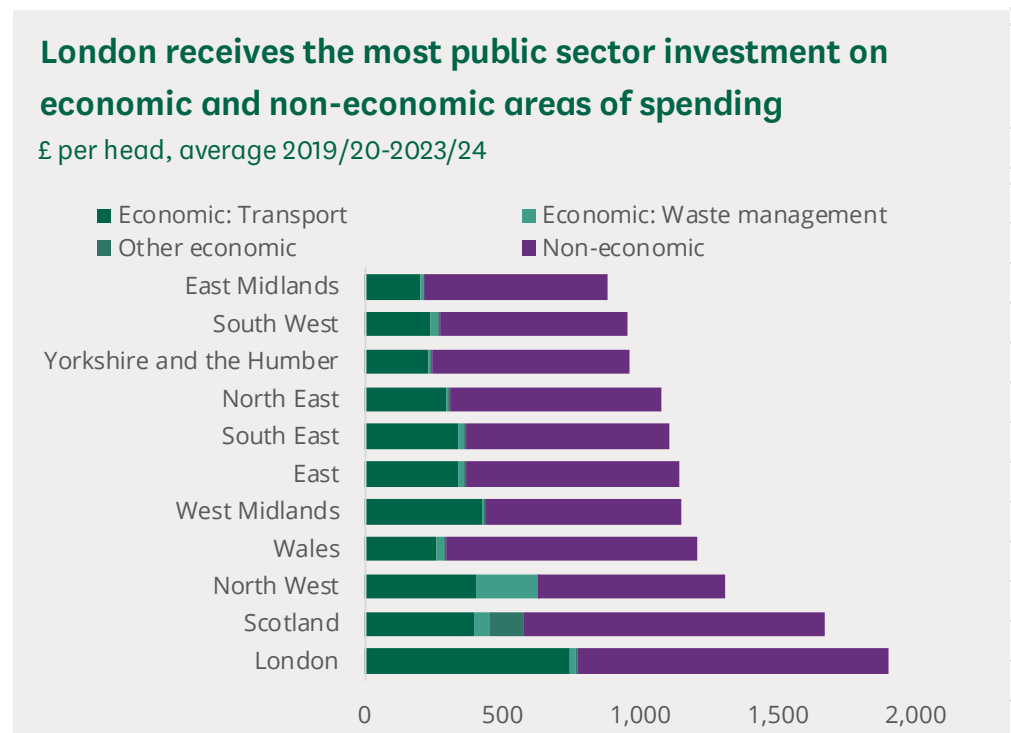
How much is invested in infrastructure in each region?

There is no complete measure of infrastructure spending at the sub-UK level. However, data are available for a broader measure of public sector investment spending (capital spending) while another source covers private sector construction infrastructure output.

Public sector investment spending

Infrastructure isn't a specific category in the public sector's sub-national spending statistics. The closest data available is government's investment (capital) spending, which includes spending on fixed assets, such as roads, buildings, computers and weapons systems, by the public sector, as well as significant amounts of research and development spending. It also includes capital grants to the private sector – for example, for social housing or as upfront recognition of student loan write-offs.

London receives the most public sector investment spending. The chart below shows, relative to population size, London receives the highest investment spending for both economic and non-economic areas. Here, we are following [the ONS's definition](#) of economic spending areas. The North West receives notably more waste management spending. This is because it is home to Sellafield, which is responsible for managing a large portion of the UK's nuclear waste.



Sources: HM Treasury. [Country and regional analysis: November 2024](#); ONS. 2022 Mid-year population estimates, accessed from <http://www.nomisweb.co.uk>

Transport investment in London is significantly higher than in other UK countries and regions but there are some caveats to this. Some of London’s higher transport spending is financed through locally raised taxes and passenger fares. Also, some of the spending in London will benefit individuals who reside elsewhere (such as those who travel into the city for work).

The chart below breaks transport investment spending down further. London Underground spending is included in London’s railway investment. London, the West Midlands and North West received the majority of High Speed 2 (HS2) investment over the period.



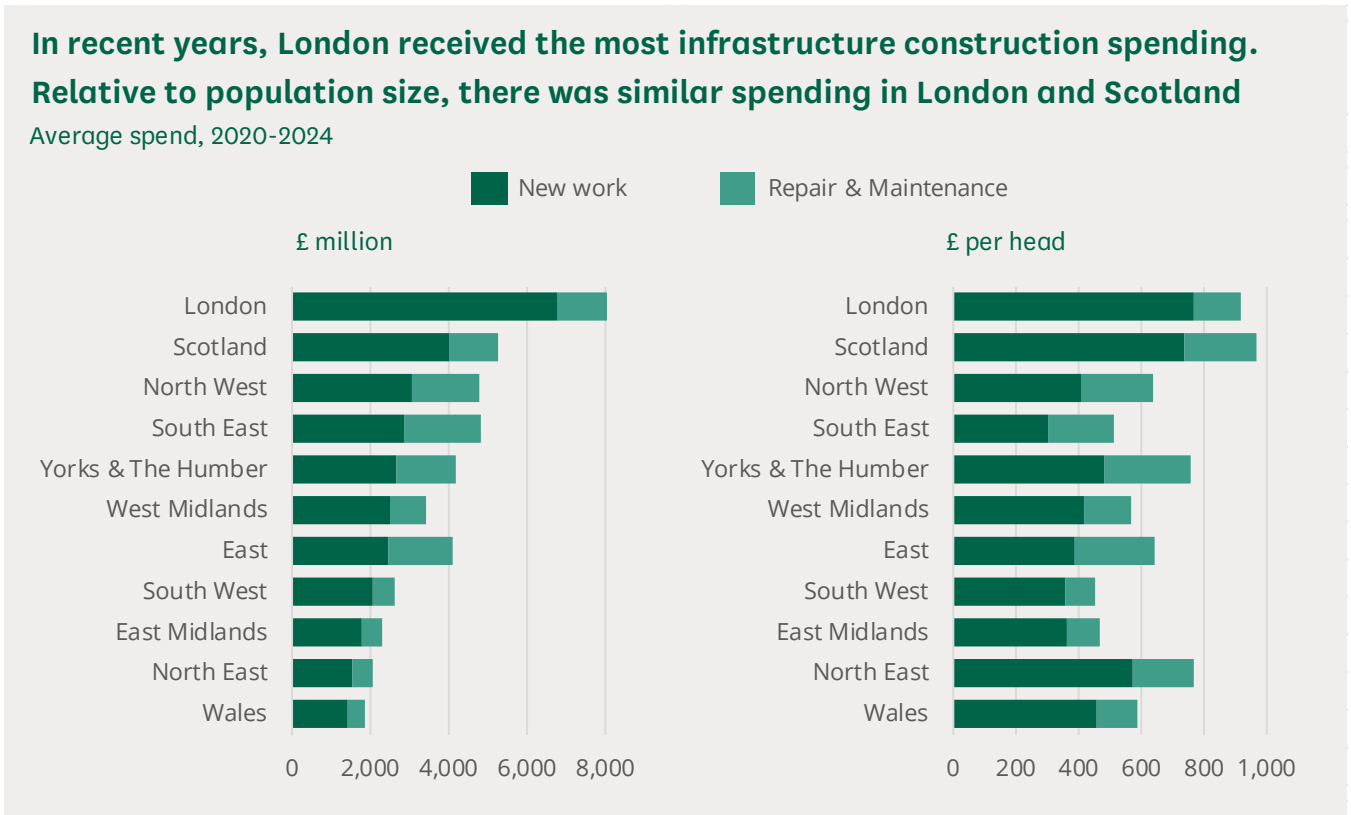
Sources: HM Treasury. [Country and regional analysis: November 2024](#); ONS. 2022 Mid-year population estimates, accessed from <http://www.nomisweb.co.uk>

Construction sector output

This data shows the value of output by construction firms commissioned to undertake new infrastructure work or carry out repairs and maintenance on infrastructure. Or in other words, it is the total value of construction work on infrastructure.

The figures are lower than for the total value of infrastructure investment, as they are based on a survey of construction firms, not specialist firms. For example, the building of a mobile tower is captured but the specialist electronics and software installed by the telecommunications company that enable the tower to operate are not.

The data covers public and privately funded construction work, but not construction work carried out by public sector bodies themselves (for example, National Rail).



Source: ONS. [Infrastructure in the UK, investment and net stocks: July 2024](#)

It should be noted that people benefit from infrastructure investment outside the region in which they live. Investment in a power station would benefit people all over the country. This data should be viewed as indicating the location of construction industry infrastructure activity, not the regions benefitting from investment (although a region containing a new power station would also benefit from it).

2.3 How many infrastructure projects are off-track?

Infrastructure projects vary widely in their time to complete depending on their complexity.

The [Government Major Projects Portfolio](#) (GMPP) is a collection of the largest and most complex projects undertaken by Government, which are not necessarily all infrastructure (for example, IT projects). It doesn't include private sector infrastructure projects. It is overseen by the Infrastructure

Project Authority (which has become part of the new infrastructure body, NISTA – see section 2.1).

Each project in the GMPP is given a Delivery Confidence Assessment Red/Amber/Green rating: ‘red’ (successful delivery appears unachievable) ‘green’ (on track for successful delivery on time, budget and quality).

The latest data is for 2024. The [Infrastructure Project Authority’s Annual Report 2023-24](#) provides a summary including a detailed annex covering each major project. In 2024, out of 227 projects in the portfolio there were:²⁹

- 27 major projects (12%) rated red (successful delivery appears unachievable)
- 163 projects (72%) rated amber (successful delivery appears feasible but significant issues already exist)
- 25 projects (11%) were rated green (on track for successful delivery on time, budget and quality).

Average DCA

To describe the overall health of the portfolio over time, the IPA looks at the average delivery confidence assessment (DCA) rating. This is calculated by assigning projects a value from 1 (green) to 5 (red) and taking an average of these values. A higher DCA average means a lower overall portfolio health (more high-risk projects).³⁰

The chart below shows the trend in average ratings since 2013. It shows the average rating increased (worsened) between 2013 and 2020 and has since plateaued. The 2023-24 Annual Report provides a similar analysis:

In the first eight years there was a decrease in projects’ health, where the average project rating worsened from Amber/Green on the 2013 Annual Report to Amber on the 2020 Annual Report. Since then, projects’ health has plateaued, and the average project rating has remained similar over the past four years.³¹

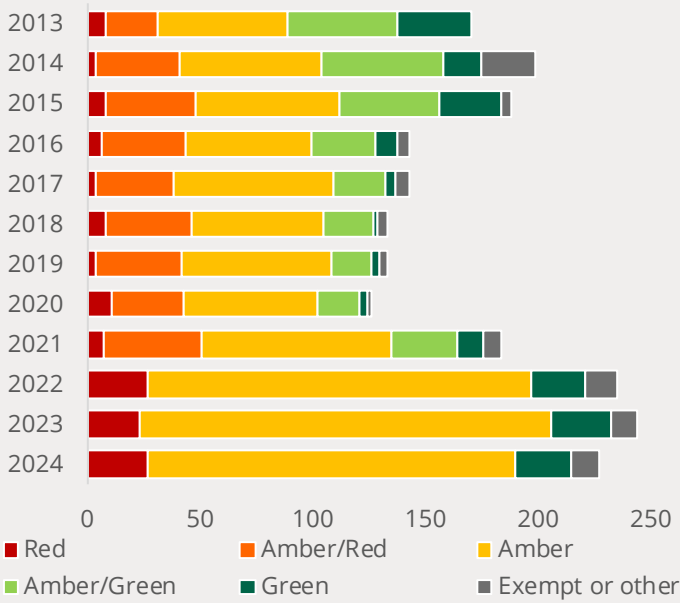
²⁹ 12 projects had no delivery confidence assessment

³⁰ Infrastructure and Projects Authority. Annual Report on Major Projects 2023-24, [page 12 \(pdf\)](#).

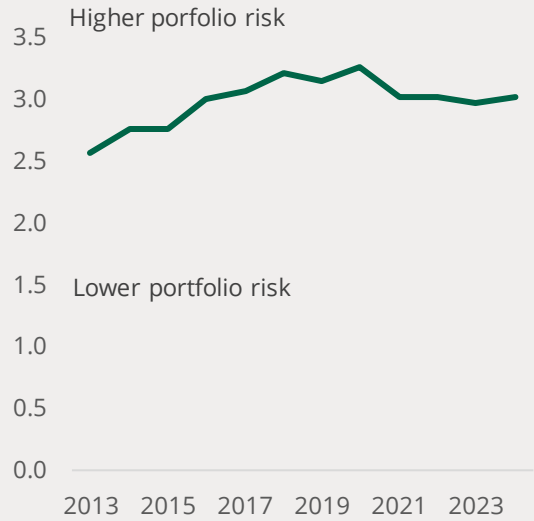
³¹ Infrastructure and Projects Authority. Annual Report on Major Projects 2023-24, [page 12 \(pdf\)](#).

There are more major projects now than in 2020 and they have a slightly lower portfolio risk

Delivery confidence assessment, by project



Average Delivery Confidence Assessment rating



Source: House of Commons Library calculations based on IPA [Annual Report 2023-24](#), 17 January 2025, Figure 8, page 12 (pdf).

Values were assigned to projects as follows: 5 (red), 4 (amber/red), 3 (amber), 2 (amber/green), 1 (green) and an average taken of these values (excluding exempt projects).

A higher DCA average means lower overall portfolio health (more high-risk projects).

3 Government policy on infrastructure

3.1 Infrastructure and the government's growth mission

Reforms targeting infrastructure are an important part of the government's economic growth mission. The [growth mission](#) is one of five national "missions" the government has set as its mandate for this Parliament and has been described by the Prime Minister as the "defining mission of this government".³²

The government's target for 1.5 million new homes to be built in England over this Parliament and for 150 planning decisions on major infrastructure to be determined (see Box below), are milestones for measuring success against the growth mission.³³

The Chancellor gave a speech in January 2025 setting out the government's plans to boost economic growth and increase investment. Many of the measures related to infrastructure and building developments, for example, expanding airport capacity such as at Heathrow, and plans to develop "the Oxford to Cambridge growth corridor".³⁴

By making it easier to build infrastructure the government hopes to improve public services and grow the economy through increased investment. These plans are likely to be longer term in nature, with the aim to boost the low economic growth rate the UK has seen since the financial crisis of 2007 to 2009.³⁵

³² HM Government, [Plan for Change: Missions and Foundations, Kickstarting Economic Growth](#), 5 December 2024 [accessed 18 March 2025]; Keir Starmer, [Keir Starmer: We'll cut the weeds of regulation and let growth bloom](#), The Times, 28 January 2025.

³³ HM Government, [Plan for Change: Missions and Foundations, Kickstarting Economic Growth](#), 5 December 2024 [accessed 18 March 2025].

³⁴ HM Treasury press release, [Government backs Heathrow expansion to kickstart economic growth](#), 29 January 2025

³⁵ Library, Research in brief, [Low growth: The economy's biggest challenge](#), 16 July 2024

How many major infrastructure projects have been approved since the 2024 general election?

The government's target for 150 major planning decisions to be determined this Parliament relates to decisions on Nationally Significant Infrastructure Projects (NSIPs).

Details of all NSIPs in England that have applied for planning permission can be found on the Planning Inspectorate's [Project Search webpage](#).

Between 4 July 2024 and 5 June 2025 there had been 19 NSIP applications decided, 18 were granted development consent and one was refused.³⁶ Once the Secretary of State has made a decision, challenges can still be made to the High Court.

There were 60 NSIP applications decided between July 2019 and July 2024.³⁷

How does infrastructure contribute to economic growth?

Infrastructure plays a crucial role in a country's economic welfare. For instance, a reliable source of energy allows companies to function more efficiently; a transport network enables producers to move goods to consumers; and the provision of schools provide the foundation for more highly-skilled workers of the future.³⁸

In short, better-quality infrastructure allows an economy to be more efficient, improving its productivity, and raising its long-term growth rate and living standards. It can also improve lives in other ways: less congestion may lead to increases in leisure or family time; improved air quality will increase health.

The right kind of infrastructure investment will increase an economy's long-term productive potential. Most long-term economic growth comes from productivity growth driven by new inventions and better ways of doing things. Infrastructure can help this process by:

³⁶ Planning Inspectorate, [Projects](#) (csv download), accessed 6 June 2025. The [Hinckley National Rail Freight Interchange](#) was refused consent on 11 March 2025.

³⁷ Planning Inspectorate, [Projects](#) (csv download), accessed 21 May 2025.

³⁸ For more on the potential benefits of investment in infrastructure see, for example, White House Council of Economic Advisors, "[The 2016 Economic Report of the President](#)", February 2016, Chapter 6 and Abdul Abiad, Davide Furceri and LSE growth commission, "[Investing for Prosperity: Skills, Infrastructure and innovation](#)", October 2013, Chapter IV

- Lowering costs for business. For example, a more efficient transport system reduces distribution costs for businesses, allowing them to produce more for the same level of inputs.
- Bringing productivity enhancing technology. Broadband is a good example. It enables customers and businesses to interact at low cost, improving the efficiency of a wide range of services, such as retail and banking.
- Enabling the efficient working of the housing and labour markets. Infrastructure is needed so housing can be built where people want to live, and so people can travel between where they want to live and where they work.³⁹

Evidence suggests that the effects on economic growth can be large when completely new infrastructure networks are developed. The railway networks developed during the mid-1800s are a good example.⁴⁰ Once infrastructure networks are matured, the impact on economic growth of future investment is likely to be closer to the returns expected from general capital investment.⁴¹

The full economic benefits of infrastructure investment can take a significant time to be realised. For instance, the Office for Budget Responsibility (OBR) reports that a “sustained 1 per cent of GDP increase in public investment could plausibly increase the level of potential output by just under ½ a percent after five years and around 2½ per cent in the long run (50 years).”⁴²

3.2

What is the government’s strategy?

Infrastructure strategy

As we discuss in section 3.1, reforms targeting infrastructure are an important part of the government’s mission on economic growth.

The government published a [10-year infrastructure strategy](#) in June 2025.⁴³ The strategy covers economic infrastructure (energy, water, communications, transport) as well as housing and social infrastructure (such as prisons, schools and hospitals). This is a broader scope than previous strategies.

The strategy supports the government’s [five missions and plan for change](#) and other strategies, such as the [industrial strategy](#). It says the government will drive growth by reforming institutions (such as the National Infrastructure

³⁹ National Infrastructure Commission. Economic growth and demand for infrastructure services, 2017

⁴⁰ National Infrastructure Commission. Economic growth and demand for infrastructure services, 2017, page 20

⁴¹ National Infrastructure Commission. Economic growth and demand for infrastructure services, 2017, pp 19-20

⁴² OBR. [Discussion paper No.5 Public investment and potential output](#), August 2024, Abstract

⁴³ The Treasury [published a working paper](#) on its thinking about the strategy in January 2025

Service and Transformation Authority), providing certainty and stability to attract investment and removing barriers to infrastructure.

The strategy sets out how public sector bodies such as the National Infrastructure Service and Transformation Authority (NISTA) and the National Wealth Fund will support the delivery of UK infrastructure. It explains the government's approach to private investment and infrastructure-related regulation and sets out how it aims to improve delivery of social, economic and housing infrastructure and support the supply chain.

The strategy explains how the government will:

- use a spatial approach to planning – which aims to take a coordinated look at infrastructure development across different areas and sectors, rather than treating each project or sector in isolation. NISTA will lead the development of a new national infrastructure spatial tool;⁴⁴
- encourage private investment – by using institutions (such as the National Wealth Fund) to match private capital to investment opportunities, evolving infrastructure financial models and reforming economic regulation in the water, energy and digital sectors;
- boost regional growth through transport and digital connectivity – including increasing maintenance of existing transport networks and improving transport within and between towns and cities. Transport projects include East-West Rail, TransPennine Route Upgrade and West Yorkshire Mass Transit system;
- provide the right conditions for new housing – including changing the [National Planning Policy Framework \(NPPF\)](#), funding a new 10-year Affordable Homes Programme, and using the [National Housing Bank](#) to catalyse private investment;
- make the UK a clean energy superpower – including securing more offshore wind, onshore wind and solar generation through the [contracts for difference](#) scheme, investing in carbon capture, usage and storage (CCUS), building new nuclear generation, decarbonising sectors and the establishment of [Great British Energy](#);⁴⁵
- deliver high quality social infrastructure – including through better collaboration across government and long-term funding for specific programmes. Health, education and justice will be key sectors for investment;
- improve the environment – including through taking a strategic and spatial approach to the environment.

⁴⁴ NISTA. UK Infrastructure: A 10 Year Strategy, June 2025, [paras 1.39-1.40](#) (PDF)

⁴⁵ For more, see Library briefing [Great British Energy Bill 2024-25](#)

The government will report on the infrastructure strategy's progress every two years. NISTA will oversee the implementation of the strategy.

Reforming institutions and processes

As discussed below, NISTA was launched in April 2025, bringing existing infrastructure bodies into one organisation. NISTA will oversee the strategy's implementation and progress reports.

The government is revising the Treasury's Green Book, [following a review](#). The Green Book sets out how the government appraises policies, programmes and projects. The revised Green Book will be simplified and shortened and will allow for '[place-based business cases](#)', which will bring together different projects that are needed to achieve the objectives for a particular place.⁴⁶

There will be a new approach to the governance and funding of mega projects, such as HS2 and Sizewell C, following a review by the Office for Value for Money (OVfM).⁴⁷ Among other changes, a strategy and delivery plan will be presented to Parliament at key stages of development and construction of mega projects. Projects being developed will receive incremental funding as the project is developed and once a project has entered the construction phase it will be given a fixed capital envelope for the entirety of the project.⁴⁸

The government is also reforming the assurance and approvals process for other projects, increasing transparency by publishing business cases for major projects and programmes (as appropriate) and providing [integrated settlements for mayoral strategic authorities](#), which will bring together funding across several public services.⁴⁹

Providing certainty and stability to attract investment

The strategy explains how the government's revised fiscal rules reduce the incentive to cut government investment (capital) spending when "balancing the books" and also support future investment spending.⁵⁰ The new net financial debt rule gives the government more scope to invest alongside the private sector through equity investments, loans and guarantees.⁵¹ The Library briefing [The UK's fiscal targets](#) has more on the government's rules for the public finances.

Departments' investment (capital) budgets are being set for five years every two years, which the government says will provide greater certainty. The government says this means it is "delivering stable and certain funding

⁴⁶ NISTA. UK Infrastructure: A 10 Year Strategy, June 2025, [para 1.13](#) (PDF)

⁴⁷ Office for Value for Money. [Value for Money \(VfM\) study on the governance and budgeting arrangements for mega projects](#), 19 June 2025

⁴⁸ NISTA. UK Infrastructure: A 10 Year Strategy, June 2025, [paras 1.34-1.35](#) (PDF)

⁴⁹ NISTA. UK Infrastructure: A 10 Year Strategy, June 2025, [para 1.17](#), [para 1.19](#), [para 1.27](#) (PDF); Gov.uk. [Integrated Settlements for Mayoral Combined Authorities](#) (accessed on 24 June 2025)

⁵⁰ NISTA. UK Infrastructure: A 10 Year Strategy, June 2025, [para 1.21](#) (PDF)

⁵¹ NISTA. UK Infrastructure: A 10 Year Strategy, June 2025, [para 1.21](#) (PDF)

allocations to avoid ‘cliff edge’ budgets”. Some projects and programmes will receive funding beyond five years and up to 10 years.⁵²

An infrastructure pipeline digital portal will be launched in July 2025. It will be regularly updated and provide information on publicly funded and financed economic and major social infrastructure projects. The Infrastructure Pipeline will also include privately funded and financed schemes where information is available. The strategy says the pipeline will “give investors and businesses a confident operational view of the opportunities ahead of us, and a reason to invest here in the United Kingdom”.⁵³

Encouraging private investment

Infrastructure covers different sectors (transport, energy, water, social and other) and can be funded from the public sector, private sector or a mix of both. The infrastructure strategy sets out different approaches the government will use for encouraging private investment:

- working with private providers of capital, such as pension funds, to unlock investment. For instance, through the [Mansion House Accord](#) and [Pensions Investment Review](#);
- matching capital to investment opportunities, using institutions like the National Wealth Fund, National Housing Fund and Great British Energy to ‘crowd in’ private capital;
- reforming economic regulation of energy, water and digital sectors to support investment;
- evolving infrastructure models, including exploring the use of Public Private Partnerships (PPPs). PPPs will be considered “where there is a revenue stream and appropriate risk-transfer can be achieved, and value for money for taxpayers can be secured”. The box below has further information.

Public Private Partnerships

Public Private Partnerships are long-term contracts between the public and private sector which bring private finance into infrastructure projects. As the Infrastructure Strategy explains:

the private sector designs, builds, finances and operates a public asset and related services. The private sector finances the construction of the asset and is recompensed for this, and ongoing maintenance, via annual payments either directly from taxpayers or through consumer charges (for example, tolls or fares).⁵⁴

⁵² NISTA. UK Infrastructure: A 10 Year Strategy, June 2025, [paras 1.22-1.23](#) (PDF)

⁵³ NISTA. UK Infrastructure: A 10 Year Strategy, June 2025, [Executive Summary](#) (PDF)

⁵⁴ NISTA. UK Infrastructure: A 10 Year Strategy, June 2025, [para 2.40](#) (PDF)

Previous use and criticism

The UK has used PPPs in the past. The Private Finance Initiative (PFI), and then the Private Finance 2 (PF2), delivered over 700 new privately financed infrastructure projects.⁵⁵ However, the model was controversial and hasn't been used since 2018. As the Library Insight [Goodbye PFI](#) explains, there were value for money concerns while there was also criticism of the complexity and inflexibility of the contracts.⁵⁶

A new approach?

The Infrastructure Strategy argues that PPPs can reduce deliverability risk as the private sector is incentivised to deliver to budget and time but this benefit needs to be balanced with the management of risks and costs.

The government will explore using new PPP models in “very limited circumstances where they could represent value for money” building on lessons learned from PFI and PF2.⁵⁷ It is considering using PPP:

- to fund HS2 running into Euston station
- in certain types of primary and community health infrastructure
- for taxpayer-funded public estate decarbonisation projects

A decision whether to use PPP will be taken by Autumn Budget 2025.

Devolved nations

The infrastructure strategy is UK-wide, although some infrastructure sectors (e.g. water and transport) are devolved policy areas. Many policy tools associated with infrastructure (planning and economic development) are also devolved. The devolved administrations also have their own infrastructure strategies:

- [The Investment Strategy for Northern Ireland \(ISNI\)](#) will set out a vision and strategic objectives for Northern Ireland's infrastructure up to 2050
- The [Infrastructure Investment Plan \(IIP\) for Scotland 2021-22 to 2025-26](#) sets out a vision for infrastructure supporting an inclusive, net zero carbon economy. The next IIP is being developed

⁵⁵ Gov.uk [PFI Centre of Excellence](#) (accessed on 24 June 2025)

⁵⁶ NISTA. UK Infrastructure: A 10 Year Strategy, June 2025, [para 2.41](#) (PDF)

⁵⁷ NISTA. UK Infrastructure: A 10 Year Strategy, June 2025, [para 2.44 - para 2.46](#) (PDF)

- The [Wales Infrastructure Investment Strategy \(WIIS\)](#) sets out a 10-year vision of the outcomes that investment in infrastructure should enable and was published in 2021.

The UK government says there is strong alignment between its strategy and the plans of the devolved administrations and that “A more joined-up approach to infrastructure in reserved areas should also support integration of devolved plans in areas like housing or transport”.⁵⁸

Planning reforms: significant infrastructure projects

Part of the government’s policies on infrastructure relate to reforms to the planning process in England, which as explained above, is considered a barrier to infrastructure development.

The [Planning and Infrastructure Bill 2024-2025](#) includes reforms to the planning process for Nationally Significant Infrastructure Projects (NSIPs) (see Box 1 above). This includes amongst other things, proposed changes to the consultation requirements for projects, a requirement for the government to regularly review national policy statements (which guide decision making on projects) and a revised procedure for legal challenge such as for cases deemed to be “without merit”.

The [Library briefing on the bill](#) provides background information (published ahead of the bill’s second reading).

3.3

Infrastructure public bodies

National Infrastructure Service and Transformation Authority (NISTA) – infrastructure oversight

The government has established a new infrastructure body: the [National Infrastructure Service and Transformation Authority](#) (NISTA). NISTA was launched in April 2025.⁵⁹

NISTA combines two existing infrastructure bodies – the [National Infrastructure Commission](#) (NIC) and the [Infrastructure and Projects Authority](#) – to bring infrastructure strategy and infrastructure delivery oversight into one organisation.

National Infrastructure Commission (NIC)

The NIC provides independent advice to the government on the UK’s future infrastructure needs.⁶⁰

⁵⁸ NISTA. UK Infrastructure: A 10 Year Strategy, June 2025, [page 14](#) (PDF)

⁵⁹ HM Treasury, NISTA, [Government ushers in new era for UK infrastructure delivery](#), 1 April 2025.

⁶⁰ See further, [Library briefing on the NIC](#), 19 January 2021.

Once a Parliament the NIC publishes a National Infrastructure Assessment to Parliament, assessing the UK Infrastructure needs over the next 50 years, to which the government commits to respond. [The Second National Infrastructure Assessment](#) was published in October 2023.

Infrastructure and Projects Authority (IPA)

The Infrastructure and Projects Authority supports the delivery of major projects in government. This includes transport projects, defence projects as well as IT transformation and digital projects and others.

It oversees projects in the Government Major Projects Portfolio (GMPP), including tracking and monitoring progresses. The GMPP is a collection of the biggest and most complex projects (see section 2.3).

NISTA's objectives

NISTA has six objectives:⁶¹

- Overseeing the government's infrastructure strategy
- Identifying and coordinating infrastructure needs
- Unblocking barriers and streamlining delivery of the government's major projects
- Setting standards and improving the government's project delivery capabilities
- Providing effective assurance for the government's priority projects
- Leading expertise on private finance

National Wealth Fund – infrastructure finance

The [National Wealth Fund](#) is an investment bank that provides finance to the private sector and local government for infrastructure projects. Its strategic objectives are to support regional and local economic growth and tackling climate change.

The National Wealth Fund (NWF) has taken on the functions of the UK Infrastructure Bank (UKIB), which was established in 2021, but with an expanded remit and revised priorities.

The government says the NWF will support its growth mission by:

- Investing in the growth-driving sectors in the [Industrial Strategy](#).
- Investing in support of the [Infrastructure Strategy](#).

⁶¹ HM Treasury and NISTA. [UK Infrastructure: A 10 year strategy](#), June 2025, para 1.10

- Investing to support strong foundations for economic security and resilience.
- Investing in city regions, high potential clusters, and Mayoral Strategic Authorities' Local Growth Plan Priorities.
- Working collaboratively with the Scottish National Investment Bank, Development Bank of Wales, and the Northern Ireland Executive.⁶²

The NWF has [various financial instruments available to it](#) including equity investment, debt and guarantees. It will commit at least £5.8 billion into green hydrogen, carbon capture, ports, gigafactories and green steel.

For local authorities, the NWF offers advisory services and low-cost finance for local authority infrastructure projects.⁶³

The NWF is owned by the Treasury but is operationally independent for day-to-day activities and individual investment decisions.⁶⁴ The government will introduce legislation to broaden the NWF's legislative mandate beyond that which it has inherited from the UKIB. The legislation is expected during the 2024-25 parliamentary session.

The NWF's recent investments include:

- providing financial guarantees to secure investment into the construction and operation of a gigafactory in Sunderland⁶⁵
- a £600m commitment to Scottish Power to upgrade the British power grid⁶⁶
- a financial guarantee of up to £400 million to cover a series of new loans provided by NatWest Group to registered providers for the retrofit of social housing stock in the UK⁶⁷
- a loan of £9.6 million to Solihull Council for its town centre energy network which will provide low carbon heating, hot water and power (electricity) to a range of town centre buildings.⁶⁸

⁶² HM Treasury. [Statement of Strategic Priorities to the National Wealth Fund](#)-

⁶³ Institute for Government. [National Wealth Fund](#), 12 February 2025

⁶⁴ [UK Infrastructure Bank Act 2023](#).

⁶⁵ National Wealth Fund. [National Wealth Fund & UKFF join forces to boost investment in Sunderland gigafactory](#), 9 May 2024

⁶⁶ National Wealth Fund. [National Wealth Fund backs Scottish Power to boost UK grid upgrades](#), 8 May 2025

⁶⁷ National Wealth Fund. [National Wealth Fund and NatWest Group to deliver £500m of funding for social housing retrofit](#), April 2025

⁶⁸ National Wealth Fund. [National Wealth Fund backs Solihull's new low carbon Energy Network](#), March 2025

Planning Inspectorate – infrastructure planning

Nationally Significant Infrastructure Projects, defined by the Planning Act 2008, require development consent from the relevant Secretary of State. This regime applies to England and to a limited extent Wales. Background information is available in the Library briefing, [Planning for nationally significant infrastructure projects](#) (8 July 2024).

Applications for development consent are made to the Planning Inspectorate, which is an executive agency of the Ministry of Housing, Communities and Local Government (MHCLG). The Planning Inspectorate carries out examinations of development consent applications on behalf of the Secretary of State and submits a recommendation report to the Secretary of State.

The final decision on whether to grant development consent to an NSIP rests with the relevant Secretary of State. For example, the relevant Secretary of State is the Transport Secretary for railways or highways, or the Energy Secretary for nuclear power plants or offshore wind farms.

[National policy statements](#) set out the government’s planning policies for NSIPs which the Planning Inspectorate and the Secretary of State should consider when they examine and decide proposed projects.

A list of all past and current projects that have been decided under the NSIP regime can be found on the [Planning Inspectorate’s register of applications](#).

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